Quick Reference Guide:

Creating Households

This guide will explain the basic process for creating households in AIM.

Topics covered in this Quick Reference Guide include:

- *Enrolling Students*
- *Adding Adults*
- *Adding Addresses*
- *Census Wizard*
- *Contact Information*
- *Non-Household Relationships*
- *Adding/Removing Household Members*
- *Splitting Households/Students with two Households*

Households are created in Infinite Campus to link students, parents/ guardians and addresses for import into Special Education forms. Households are defined as the group of adults a student resides with – and students may have multiple households. Households define location and relationships. Follow the steps below to successfully create households.

Steps for Creating Households:

1. **Enrolling Students**
   - Students must be enrolled before they can be added to households.
2. **Adding Adults**
   - Use the Census/Add Person tool to add adults.
3. **Adding Addresses**
   - Use the Census/Add Address tool to add addresses for households. Addresses may be mailing, physical or both.
4. **Assembling Households**
   - Use the Census Wizard tool to combine students, adults and addresses into households.
5. **Contact Information**
   - Contact information may be added to individual household members if the IEP team wishes to include this information in their Special Education forms.
6. **Non-Household Relationships**
   - Adults not residing in the student's household may be associated with the student.

STEP 1 – Enrolling Students

Use the **Student Locator** or the File Upload method to enroll the student in the correct *Grade* and *Calendar*.

(path: Index, Student Information, Student Locator)

Redford, Robert

Grade: 03   DOB: 01/16/2004   Gender: M

| Demographics | Identities | Households | Relationships | Enrollments | Distric |

Print Enrollment History   ⊕ New   ⊕ New Enrollment History

Enrollment Editor

Edit	Grade	Type	Calendar	Start Date	End Date
📝	04	P	14-15 Philipsburg School	08/27/2014	
			Start Status: 02 Continued enrollment same school, no interruption		
			End Status:		
📝	03	P	13-14 Philipsburg School	09/03/2013	05/31/2014
			Start Status: 04 Transfer from public school in district or state		
			End Status: 100 End of year, returning to same school next year		

Index   Search   Help   ‹

File Labels By DOB
Folder Labels by DOB
No Show Report
Process Compliance
Service Detail
Service Provider Detail
Service Provider Summary
Service Summary
State Enrollment Overlap
State Enrollment Verificatio
Graduation Cohort Validati
Test Accommodations (de
Test Results
▸ Instruction
▾ Census
  People
  Households
  Addresses
  Add Person

Person Search

Person Search
Search for a person already tracked in Campus using the fields provided, required fields are in red. Select a student from the list or click on Create New Person.

*Last Name   Redford
First Name
Middle Name
Birth Date
Gender
Search

Create New Person

Step 2 – Adding Adults

Use the **Add Person** tool in the **Census** module to add adults that live in the student's household(s).

From the **Index**, expand **Census** and click *Add Person*.

Enter the person's last name and click *Search*.

If the person does not appear on the screen details, click *Create New Person* at the lower righthand corner of the screen.

September 2014

Creating Households

Enter *Last Name, First Name* and *Gender*.

Click **Save**.

Repeat for all adults associated with the student's household(s).

NOTE: Do **not** create students using the **Add Person** tool – use the **Student Locator**.

New Person

Person Creation

Fill out the form to create a new Person in Campus. Click save to create the person, afterwards, they will appear in the list below.

Person Information

*Last Name	*First Name	Middle Name	Suffix
Redford	David		

*Gender	Birth Date	Soc Sec Number
Male		

Race/Ethnicity

Is the individual Hispanic/Latino?

Is the individual from one or more of the these races? (check all that apply)

☐ American Indian or Alaska Native

☐ Asian

☐ Black or African American

☐ Native Hawaiian or Other Pacific Islander

Save

Index   Search   Help   <

File Labels By DOB
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No Show Report
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Service Detail
Service Provider Detail
Service Provider Summary
Service Summary
State Enrollment Overlap
State Enrollment Verification
Graduation Cohort Validati
Test Accommodations (de
Test Results
▸ Instruction
▾ Census
   People
   Households
   Addresses
   Add Person
   Add Household
   Add Address
   Staff Locator

Add Address

Address Search

Search for an address already tracked in Campus us

House/P.O. #	1227	✕
Street Name		
Street Tag		
Apt #		
City		
Home Phone	( ) - x	

Search

New Address

STEP 3 – Add Address

Use the **Add Address** tool in the **Census** module to add an address for the student's household.

From the **Index**, expand **Census** and click **Add Address**.

Enter only the *House/P.O.* number. Click **Search**.

If no match exists, click **New Address** at the lower righthand side of the screen*.*

September 2014

Creating Households

Achievement in Montana
Montana's State Student Information System

Montana
Office of Public Instruction
Denise Juneau, State Superintendent
opi.mt.gov

Address Creation

Address Creation

Fill in the fields below. This will create a new Address object in the database and then continue on to the next Process Step.

Address Information

P.O. Box	Number	Prefix	Street	Tag	Direction	Apt
☐	1227		Rimrock Rd			

City	State	Zip	County	Location Code
Happyville	MT	59233 -	▾	

Latitude	Longitude	Tract	Block
🔍	🔍		

Comments

District ▾

Complete the **Address Information** fields as applicable.

Click *Save* at the lower righthand side of the screen.

Note: For a P.O. Box, check *P.O. Box*, enter *Number*, *City*, *State* and *Zip*.

STEP 4 – Census Wizard

Use the *Census Wizard* Tool in the **Census** module to assemble the household.

From the **Index**, expand **Census** and click *Census Wizard*.

Under **Person Search**, enter the student's *Last Name*.
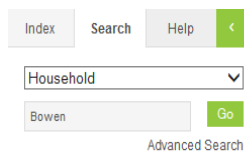
Click *Search* (under **Person/ Address/Household Search**).

Click the student's name from the **Census Wizard Search Results**.

If the parent/guardian's name(s) also appear in the *Search Results*, click their name(s) to add them to the household.

If the parent/guardian's name(s) are different than the student, enter their last name.

Click *Search* and add them to the household.
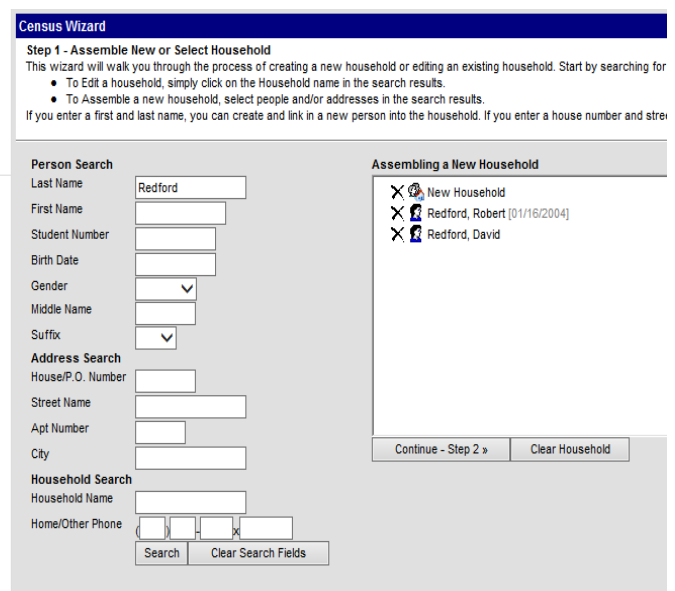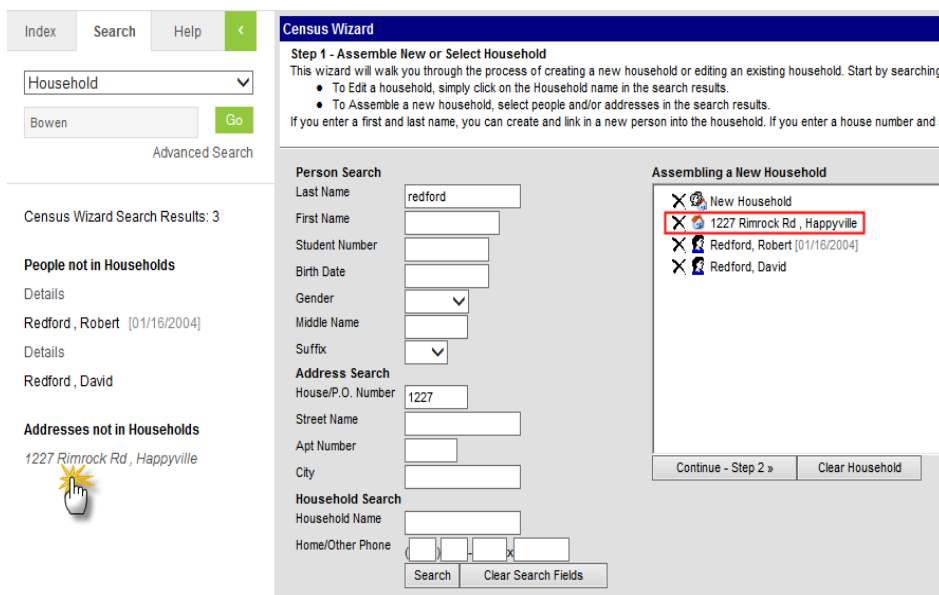
Enter the *House/P.O. Number* under **Address Search**.

Under **Person/Address/Household Search,** *click* **Search**.

Click the *Address* from the **Census Wizard Search Results**.

If the student has more than one address, repeat the search and add the second address to the household.

Verify that the following are in the household box:

- **Student**

- **Parent/guardian(s)**, and;

- **Address(es)**

Click **Continue – Step 2**.

Enter *Household Phone Number*.

Enter *Start Date* for the **Address** and click *Mailing* (if applicable).

For multiple addresses, click *Mailing* and *Secondary* for a P.O. Box and nothing for the physical address.

Enter *Start* dates for all **Household Members**.

Click *Save & Continue – Step 3*.

Find the line that says *Relationships to **Student***.

Complete *Relationship*, *Start Date* and mark the boxes for *Guardian*, *Mailing* and *Portal* as appropriate.

Click *Save & Done*.

NOTE: Only complete this information for the student. Do **not** attempt to complete this information for adult household members.

STEP 5 – Contact Information (Optional)

Districts may choose to enter contact information for adult household members, including contact phone and/or email.

Click the **Search** tab. Select *All People*. Enter the person's last name and click *Go*.

Click the name of the person under **Search Results**.

Scroll down to the **Personal Contact Information** section and enter *phone number(s)* and/or *email*.

Click *Save*.

STEP 6 – Non Household Relationships (Optional)

Click the **Search** tab. *Select All People*. Enter the student's last name and click *Go*.

Click the student's name from **Search Results**. The **Demographics** tab should be the first tab visible (if not, return to the **Index**, expand **Census** and click *People*).

Click the **Relationships** tab.

Click *New Non-Household Relationship*.

Enter the person's last name and click *Search*.

If the person already exists, click the name to add them to the student.

If the person does not exist, click *Create New Person*.

Enter *Last Name*, *First Name* and *Gender*. Click *Save*.

Redford, Robert
Grade: 03   DOB: 01/16/2004   Gender: M

After adding the person, click
From the **New Person** screen,
click **New Non-Household
Relationship**. Enter the last
name, and *click* **Search**.

When the person's name
appears in the Person Search
results, click the name to add
the relationship to the student,
then click the red X to return to
the Relationships screen.

Select *Relationship*, enter
Start Date and check
Guardian, *Mailing* and
Portal, if appropriate.

Click *Save*.

To add *Relationships*, return to the **Index**. Expand **System Administration** and **Census**. Click *Relationship Type*.

Click **New**. Type the *Name* and click **Save**.

Students may live among more than one household (parents divorced, student in foster care, etc).

These students need two households created.

Create additional households for the student using the same process shown above.

A slight variation occurs when the student lives with one parent, but has visitation with another parent, in another town.

On the second step of the *Census Wizard*, mark the student *Secondary* under **Household Members** – this is the student's secondary household (this is not their primary residence).

Census Wizard - Edit Household Membership

Step 2: Editing Household Data
Edit the attributes common to the household and edit details specific to each person and address.

Household

Household Name (Override)	Household Phone Number	Private
	(406) 555 - 1212 x	☐

Household Locations

Address	Start	End	Private	Secondary	Mailing
123 Washington Ave , Anywhere MT 55555	08/01/2011		☐	☐	☐

Household Members

Name	Birthdate	Gender	Start	End	Private	Secondary
Judd, Wynonna	05/10/2005	F	08/01/2011		☐	☑
Judd, Dad		M	08/01/2011		☐	☐

Save & Continue - Step 3 »

Index	Search	Help	‹

Household ▾

Kent	Go

Advanced Search

Search Results: 1 households

Kent (4 members)

125 Parkhill Street , Someplace
Kent , Mom (guardian)
Kent , Clark A #999100011 [07/25/199
Kent , Father
Kent , Gramma

Kent Household

Household Info	Addresses	Members

💾 Save   ⊗ Delete

Household Information

Name	Phone Number	Private
	( ) - x	☐

Comments

- Modified by: Administrator, System 08/27/2014 16:25

Adding/Removing Household Members

Household members should **never** be deleted – unless they were added in error.

Click the **Search** tab. *Select Household*.

Click *Go*.

Click the **Members** tab.

Click the name of the member to remove from the household.

Enter an *End Date* and click *Save*.

Kent Household

Household Info   Addresses   **Members**

💾 Save   ⊗ Delete   🔍 Find New Member

Household Member Editor

Name	Start Date	End Date	Secondary	Private
Kent, Clark A	08/01/2014			
Kent, Father	08/01/2014			
Kent, Gramma	08/01/2014			
Kent, Mom	08/01/2014			

Household Member Detail

Name
Kent, Gramma

Start Date
08/01/2014

End Date
10/12/2014

Secondary
☐

Private
☐

Kent Household

Hous...

Infinite Campus ✕

Household Relationships

You are about to end the household membership for Gramma Kent in this household. What would you like to do with the household relationships.

◉ Keep the relationships.
   (You can manually end or delete these relationships later.)

○ End the relationships by adding an end date.
   08/27/2014

○ Delete the relationships.
   (Warning: this will leave no historical record of these relationships.)

Ok   Cancel

When prompted, choose the appropriate action.

Click *Ok*.

Splitting Households

If a student's household separates into two distinct households, create a new household for the exiting parent.

First, exit the leaving parent from the household following the instructions above.

The *End Date* should be at least yesterday for two separate households to appear in the **Search Results**.

When prompted, *choose **Keep the relationships***.

Click *Ok*.

Follow the instructions above to create a second household for the student.

The student will have two separate households.

For further assistance, contact the AIM Help Desk at
opiaimhelp@mt.gov or 1-888-424-6681.